



Getting Started

With ASKTRA, you're never alone. Coach Phil—our AI-driven coach—is here to support your journey. The best way to learn ASKTRA is to start using it. It's quick and simple.

Let's get started by learning ASKTRA's three solutions:

1. **ACADEMY: Learn and Grow**

Access 300+ micro-lessons, ebooks, and series to help you grow and manage your business. Whether it's managing cash flow, generating referrals, or improving risk management, the ACADEMY provides practical skills in bite-sized lessons. Simply choose a topic from the four key categories: Customer Engagement, Leadership, Marketing, or Sales.

Tip: Use the Solution Concierge to pinpoint the best category for your needs.

2. **BUSINESS COACH: Meet Phil**

Coach Phil delivers AI-powered, personalized guidance to help you improve customer retention, strengthen leadership, refine marketing, and drive sales. Get clear, actionable advice tailored to your business goals.

Tip: Ask Phil specific questions and provide as much detail as possible for the best results.

3. **DEAL REVIEWER: Boost Your Sales**

Receive real-time insights and recommendations from Deal Reviewer Phil, powered by AI. Optimize your deals, investments, and partnerships for the best outcomes. Make smarter decisions faster with instant feedback.

Tip: The more detailed the information you share, the better Phil's recommendations will be.

4. **BONUS: SOLUTION CONCIERGE**

Not sure which ASKTRA solution fits your needs? Solution Concierge Phil helps you match your specific use case to the right solutions in seconds.

Tip: Clearly explain what you want to achieve for the most accurate recommendations.

5. Stay Informed

Keep an eye on your ASKTRA Inbox for updates and new resources, including new content, feature updates, and improvements to enhance performance and usability.

Conclusion

Coach Phil reminds you: don't try to tackle everything at once. Use ASKTRA to address your specific needs as they arise. It's designed to support you on demand, providing help whenever and wherever you need it most.

At ReferralSafe, the creators of ASKTRA, we believe in the power of small businesses. As small business owners ourselves, we understand the challenges and joys of running a business. That's why we built ASKTRA—to bring corporate-level tools and insights to Main Street.

With ASKTRA, you get a learning ACADEMY, a BUSINESS COACH, and a DEAL REVIEWER all in one platform. Built by small business owners, for small business owners, ASKTRA is your partner in growth. Let's grow together!

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit www.referralsafe.com/asktra frequently for new additions.